DOCUMENT RESUME

ED 055 632 LI 003 187

TITLE	Information and Referral Services: A Training Syllabus; Working Draft.
INSTITUTION	American Rehabilitation Foundation, Minneapolis, Minn. Inst. for Interdisciplinary Studies.
SPONS AGENCY	Administration on Aging (DHEW), Washington, D.C.
PUB DATE	28 Feb 71
NOTE	42p.; (59 References)
EDRS PRICE	MF-$0.65 HC-$3.29
DESCRIPTORS	Community Services; *Curriculum Guides; *Evaluation; Information Centers; *Information Services; Manuals; *Objectives; *Older Adults; Referral; Social Services; Staff Improvement; Training

ABSTRACT

The overall purpose of the information and referral (I & R) staff training program is to develop staff competence in providing the services described and outlined in the operation manuals. Although there is some leeway regarding implementation of the full complement of I & R services, the total service as it is envisaged includes provision of information, referral, follow-up, volunteer escort service and outreach. This manual is divided into the following chapters: (1) The Importance of Staff Training; (2) Purpose and Objectives of I & R Training Program; (3) Methods for Training; (4) Formal Training Program; (5) Training in Addition to Formal Training Program; and (6) Training Evaluation. Appendix A contains the course outline, Appendix B presents sample questions and Appendix C is a bibliography. (Other manuals in this series are available as LI 003188 through LI 003195). (Author/NH)

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ED055632

Information and Referral Services:

A TRAINING SYLLABUS

(Working Draft)

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Under a Title IV Grant

from the

U. S. DEPARTMENT OF HEALTH,
EDUCATION, AND WELFARE
Social and Rehabilitation Service
Administration on Aging

February 28, 1971

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Acknowledgements

We wish to acknowledge the contributions of persons who have had a major role in the development of this series of manuals. At the Institute for Interdisciplinary Studies, special consultant, Mrs. Shirley Zimmerman, deserves a very special thanks. Without her effort, the manuals would not exist. Mrs. Martha Cushing also made significant contributions in the development of the training manual. The helpful guidance of Mrs. Corazon Doyle and Professor Alfred Kahn during the development of this manual is also deeply appreciated.

Nicholas Long, Ph.D.
Project Director
February 28, 1971

Chapter 1: The Importance of Staff Training

Training for information and referral center staff, paid and volunteer, must be an on-going, continuing process for which provision should be made by the administrative or funding agency.

No center should be allowed to open unless all staff have received an orientation to the overall concept of the I & R center network, as well as to the specific services and activities of the individual center. No staff person should begin without prior training for the responsibilities he is about to assume. Nor should there be a distinction in the training provided to paid and non-paid staff (volunteers) who have similar responsibilities. Training for center managers, however, should be both the same as and different from other staff. They will be required to perform as information and referral specialists when needed, and also to carry out duties and responsibilities unique to their position as center managers.

Before the initial training period begins, all staff must read the operation manuals relevant to the services that they will be providing.

Chapter 2: Purpose and Objectives of I & R Training Program

The overall purpose of the I & R training program is to develop staff competence in providing the services described and outlined in the operation manuals. Although there is some leeway regarding implementation of the full complement of I & R services, the total service as it is envisaged includes provision of information, referral, follow-up, volunteer escort service, and outreach. Some centers will opt to provide the entire service package. Others will not. All centers, however, will be required to provide information as a basic minimum service.

Further, it is anticipated that centers will not offer the full array of designated services immediately upon opening. Rather is is expected that services will be added in phases, taking into account staff development in knowledge and skills and also available financing for the provision of each added service component.

Another anticipation is that separate components of the total service, such as outreach, can be incorporated into existing I & R center operations, provided these centers agree to use the forms and materials relevant to that particular service and that have been developed for the I & R center network. Therefore the training program must take into account the developmental stages of individual centers in addition to staff training needs.

Training objectives for the complete complement of center services are to develop staff knowledge and competence in the following categoried areas:

1. For center managers primarily:

   . working with advisory committees

   . work and staff management

   .public and community relations

   .recruiting volunteer escorts and organizing volunteer escort service

2. For center managers primarily, but also for those assisting with community resource survey:

   .conducting a community resource servey

   .organizing the resource file

3. For all center staff including center manager:

   .purposes and functions of I & R center network

   .community resources and their respective systems in relation to I & R service

   .using the resource file

   .using I & R forms

   . understanding people

   .understanding the problems of older people

   .understanding one's self

   .interviewing to identify accurately the person's need or problem

   .listening

   .providing information

   .assessing the need for referral

   .referring the person to the appropriate provision

.assessing the person's need for volunteer escort service

.providing follow-up services with agencies and individuals

.being an advocate

4. For center managers, outreach supervisors and workers

.supervising outreach workers

.extending I & R service into the community

As suggested earlier, training objectives will be modified according to the developmental stage of individual centers. It should also be noted that while training objectives are the same for all staff in most cases, objectives vary according to staff assignment. Not all staff will be trained to do a community resource survey, for example, since this is a one-time initial effort. Nor will all staff be trained for outreach if this is not their work assignment. Training is most effective when it is relevant and pertinent to the person's work responsibility. Please note that center managers must be trained in all phases of the I & R service in order to provide direction and guidance to others. In addition, center managers must receive training for some of the broader responsibilities that they have, such as working with committees, work and staff management, etc.

Chapter 3: Methods for Training

The methods used in the formal training of I & R specialists will vary according to the content to be learned. Teaching methods should include:

- lecture or formal presentations
- group discussion
- study of case material related to older people and applicable to I & R service (written, audio or visual)
- reading assignments
- role playing
- demonstrations
- films

These methods can later be supplemented and augmented by a brief period of observation and practical experience in an I & R center after the I & R center network becomes an established entity.

Chapter 4: Formal Training Program

Time for formal training should be set aside for staff to learn to carry out the objectives and purposes of the I & R service. Monetary compensation should be provided accordingly.

Responsibility for staff training lies with the state administrative agency which in turn may delegate this responsibility to a qualified agency or person on a contractual basis. It is essential, however, that this agency or agent be thoroughly familiar with the operation manuals which make explicit the knowledge, skills and attitudes that I & R staff must acquire in order to provide the service envisaged. The training program should complement and supplement the operation manuals which should be used as training guides and basic texts for the program. The operation manuals, in turn, should be supplemented by recommended readings which pursue in greater depth the problems of the elderly, community resources for them and the elements and dynamics of interviewing.

It is suggested that the training program be divided into three or four phases for those centers that offer the entire service package as delineated in the manuals. Such phasing will allow training to be more timely and relevant in terms of the immediacy of tasks to be faced by center staff. Other centers should be involved only in those phases of the program that are relevant to the services they will be providing. Since all centers must provide the basic information service, most staff will receive training initially in conducting a community resource survey, organizing the resource file and interviewing and information giving.

The only exception to this may be staff in already established centers where the basic service has already been organized and who are coming into the network via the addition of one of the components developed especially for the I & R network. Even so, opportunity for formal training in other phases of the I & R service may be welcomed by such staff, and their participation should not be discouraged. All staff, regardless of their point of entry into the service should be familiarized with the purposes and functions of the I & R center network.

Chapter 5: Training in Addition to the Formal Training Program

On-The-Job Training

In addition to the formal training provisions for which specific time is set aside, training also must be provided on the job, especially at the outset, to facilitate the smooth handling of routine work and inquiries as well as emergency situations.

In-Service Training

In addition to the initial training program and on-the-job training, provision also should be made for in-service training. In-service training in an I & R center should be designed to strengthen and reinforce ma material presented in the formal training program, to overcome weaknesses in performance and to refine skills needed for effective service. It also should be designed to provide an opportunity to learn facets of programs for the aging in greater depth.

In-service training should be conducted weekly or every two weeks, but not less than monthly. Arrangements can be made to contract for in-service training from another social agency in the community or with a faculty member of a school of social work at a local university. The state agency staff also have responsibility for in-service training at the level of the individual center.

Consultation

To help deal with complex problem situations and people, special arrangements should be made by the state agency, together with the individual center, for legal and psychiatric or social work consultation as recommended in the operation manuals. Although care has been taken in the operation manuals to avoid the likelihood of developing a case-work relationship or approach to the provision of I & R services, reasonably accurate assessment of personal problems and needs is nontheless imperative. Even for highly trained professional staff, such an assessment is often difficult without consultation and advice. In the kind of staffing generally anticipated for the I & R center network, such professional consultation is very important. Arrangements for consultation should be made on a regular weekly or twice-monthly basis for those problem cases that can wait for this period of time. For cases that require immediate attention, arrangements should be made to obtain consultation when and as it is needed. In addition to assuring responsible service to older people and to the community, consultations can be valuable learning experiences for I & R staff.

Conferences and Meetings

Conferences and meetings conducted under the auspices of community agencies such as Health and Welfare Planning Councils, State Welfare Associations and the National Association of Social Welfare should be attended if the content is relevant to I & R concerns. Such meetings often can be very informative and helpful in keeping staff current on developments related to older persons. Frequently there is a speical workshop scheduled on I & R services at the annual National Conference on Social Welfare.

Newsletters and Periodicals

Newsletters and periodicals published by organizations such as AFL-CIO, National Association of Social Workers, National Council on the Aging, Administration on Aging, National Center for Voluntary Action, etc. are also important sources of information, particularly in relation to programs or pending programs for older people at the local level. The center should subscribe to these newsletters and periodicals on a regular basis.

Related Educational Opportunities

Local universities through their general extension divisions often offer educational opportunities for learning about human behavior, problems of the older people, interviewing, supervision, and government programs realted to older people. Staff should be encouraged to use these opportunities to enhance and reinforce the formal training provided by the state agency. If such opportunities do not seem to present themselves from time to time, they often can be arranged upon request. The state agency should be prepared to reimburse staff for fees and other related costs, such as travel. Again, time spent in pursuit of job-related education should be considered as time on the job and compensated accordingly. Consideration must be given, however, to the spacing of time away from the office and for adequate staff coverage of the center to ensure the continued and effective provision of center services.

Chapter 6: Training Evaluation

Evaluation should be an integral, on-going part of the total I & R training program. The crucial test of any training program, of course, is whether trainees can perform the tasks for which they have been trained. If not, the program should be carefully scrutinized to see where it is failing, to sharpen its content, improve its methods, and perhaps, to provide additional supportive supervision. If the content is too simple, trainees may be bored and unmotivated to learn. If it is too complex, they may feel overwhelmed and confused.

While the demonstration phase of this study should determine where basic modifications should be made in program content and method, evaluation must be an ever present process and a part of every training program, taking into account and reflecting the constancy of change in the community, in knowledge, and in trainees' needs.

APPENDIX A

COURSE OUTLINE

TRAINING IN THE INFORMATION AND REFERRAL CENTER NETWORK

COURSE OUTLINE

PHASE I & II - INTRODUCTION TO TRAINING PROGRAM: For All Staff

Resource Person	Content	Reference	Method
Training Coordinator	Welcome Introductions		
	Purpose of Training Program	Training Syllabus, Chapter 2	Lecture Presentation
	Rationale and Objectives of service network	Notes for Managers, Chapters 1&2	Assigned reading in Notes for Managers
	Problems encountered by elderly and some examples	"Tell me Where to Turn" Kahn, et. al. Neighbor-Information Centers, p. 112-119	Film Lecture Discussion
		Notes for Managers, Chapter 1, p. 2-4, "Inside-Outside"	Assigned reading in Notes for Managers Film Discussion of problems shown in film
	Qualities and characteristics of service	Notes for Managers, Chapter 4	Assigned reading in Notes for Managers Group discussion.
	Necessary qualities of I & R worker	Notes for Managers, Chapter 4	Assigned reading in Notes for Managers Discussion
	Knowledge needed related to objectives of service	Notes for Managers, Chapter 5	Assigned reading in Notes for Managers Discussion

TRAINING IN THE INFORMATION AND REFERRAL CENTER NETWORK

COURSE OUTLINE

PHASE I - TO SET UP SHOP: For Center Managers

Resource Person	Content	Reference	Method
Training Coordinator or Specialist in Administration	What you need: Office space Secretarial help, qualities to consider Professional Consultation Volunteers Public relations & publicity Office supplies & equipment City maps & bus schedules Supplementary aides	Notes for Managers, Chapter 6 p. 18-19 Bibliography #32 Notes for Managers, Chapter 6, p. 20-22	Assigned reading in Manual Lecture Discussion Assigned reading in Manual and Bibliography Discussion Lab assignment
	Management to Make Service Feasible Putting time to good advantage Planning ahead Spacing and arranging time Deligating tasks Paying attention to details	Notes for Managers, Chapter 7, p. 23-29 Bibliography #35, Chapter 9 & 10	Assigned reading in Manual Lecture Discussion
	Working with board or advisory committee Purpose of board or advisory committee Use and abuses of adivisory committee Risks How to use advisory committee effectively Committee involvement & participation	Bibliography #33, p. 21-48 Bibliography #35, Chapter 8	Lecture Discussion Role play Lab assignment

TRAINING IN THE INFORMATION AND REFERRAL CENTER NETWORK

COURSE OUTLINE

PHASE I - TO SET UP SHOP: For Center Mangers

Resource Person	Content	Reference	Method
Training Coordinator or Specialist in Administration	Organization and planning of meetings Prepartation and distribution of agenda Purpose of agenda Record of meeting Reporting back		

TRAINING IN THE INFORMATION AND REFERRAL CENTER NETWORK

COURSE OUTLINE

PHASE I - RESOURCE FILE: Center Managers and Assisting Staff

Resource Person	Content	Reference	Method
Training Coordinator or Special Instructor	Overview: Development of Resource File Characteristics of good Resource File Planning a Resource File Phasing into service Keeping current	Resource File, Chapter 1 p. 1-3	Assigned reading in Manual Lecture
	Planning Resource File 1. Service File Category Table 1 (i.e., Financial, Housing, Health, Home Helps, Legal, Leasure Time, Personal-Social, Spiritual, Transportation, Miscellaneous, Government, Voluntary, Non-Profit, Private-Profit, Individuals)	Resource File, Chapter 2 p. 4-8	Assigned reading in Manual Lecture Lab

TRAINING IN THE INFORMATION AND REFERRAL CENTER NETWORK

COURSE OUTLINE

PHASE I - RESOURCE FILE: Center Managers and Assisting Staff

Resource Person	Content	Reference	Method
Training Coordinator or Special Instructor	2. Identifying Agencies serving the elderly within each category, Table 2. (i.e., Obtaining name, address and phone number for each agency from the Yellow Pages. Putting information on 3x5 index cards, filing alphabetically. Supplementing with existing lists.)	Resource File, Chapter 2, p. 9-13	Assigned readingin Manual Lecture Lab
	3. Obtaining information for the Resource File from identified agencies. Determining which agencies to contact in which way.	Resource File, Chapter 2, p. 15-17	Assigned reading in Manual Lecture Discussions
Obtaining information by personal interview Who should get one Definition of an interview Arranging an interview Phone call followed by a letter Letters followed by phone call Number of daily appointments		Resource File, Chapter 3, p. 18 Resource File, Chapter 3,p.18-20. Resource File, Appendix, p. 44 Resource File, Appendix p. 45-46 Resource File, Chapter 3, p.21	Assigned reading in Manual Lecture Role Play Discussion

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TRAINING IN THE INFORMATION AND REFERRAL CENTER NETWORK

COURSE OUTLINE

PHASE I - RESOURCE FILE: Center Managers and Assisting Staff

Resource Person	Content	Reference	Method
Training Coordinator or Special Instructor	Helpful Hints -		
	Interviews take priority over office work	Resource File, Chapter 3, p. 22	
	Being persistent		
	Arranging interviews in advance	Resource File, Chapter 3, p. 23	Assigned reading in Manual Discussion
	Arranging several interviews at once	Resource File, Chapter 3, p. 23	
	Keeping calendar	Resource File, Chapter 3, p. 23	
	Using taff	Resource File, Chapter 3, p. 23	
	The Interview		
	Keeping appointment and being on time.	Resource File, Chapter 3, p. 24	Assigned reading in Manual Lecture Role Play Discussion
	How to dress	p. 24	
	When you arrive	p. 24	
	Starting the interview	p. 25	
	Using the agency questionnaire	Resource File, Appendix, p.54-64	
	Items included in questionnaire	Resource File, Chapter 3, p. 27	
	Ending the interview	Resource File, Chapter 3, p. 28	
	Thank you letters	Resource File, Chapter 3, p. 28 Appendix, p. 47	
	Obtaining Information by mail to all who could not be contacted personally.	Resource File, Chapter 4, p. 30	Assigned reading in Manual
	Return rate		
	Second Mailings		

TRAINING IN THE INFORMATION AND REFERRAL CENTER NETWORK

COURSE OUTLINE

PHASE I - RESOURCE FILE: Center Managers and Assiting Staff

Resource Person	Content	Reference	Method
Training Coordinator or Special Instructor	Obtaining information from private practitioners serving elderly Through Professional Association Using names on a rotating basis	Resource File, Chapter 5, p. 31	Assigned reading in Manual Lecture Discussion
	Processing information for Resource File The Agency File, Agency Master File Duplicates for each staff person The Service File Using categories in Table 1. and numbering system Master Service File and duplicates for each staff person Cross index card file	Resource File, Chapter 6, p. 32 p. 34 p. 32 p. 35 p. 6-9 p. 35 p. 9	Assigned reading in Manual Lecture Lab assignment
	Recruiting help to develop Resource File Community Service Organizations Factors to consider in using volunteers Competence Time available Later benefits Training volunteers to interview training session with role play volunteers observations of trained interviews	Resource File, Chapter 7, p. 38 p. 39-40	Assigned reading in Manual Lecture Role play Discussions

TRAINING IN THE INFORMATION AND REFERRAL CENTER NETWORK

COURSE OUTLINE

PHASE I - RESOURCE FILE: Center Managers and Assisting Staff

Resource Person	Content	Reference	Method
	trained interviewers observing volunteers	p. 39-40	
Training Coordinator or Special Instructor	Keeping Resource File current correcting errors in files updating files - forms used	Resource File, Chapter 8, p. 41-42 Resource File, Appendix, p. 50-51	Assigned reading in Manual Lecture Lab assignment

TRAINING IN THE INFORMATION AND REFERRAL CENTER NETWORK

COURSE OUTLINE

PHASE II - COMMUNITY RESOURCES: For All Staff

Resource Person	Content	Reference	Method
Training Coordinator	Community resources included in I & R Network Financial Housing Health Home-helps Legal Leisure time Personal-social Spiritual Transportation Miscellaneous Taxes Emergencies	Pamphlets - See Supplementary Material List and Bibliography Training Syllabus, Appendix C. p. 34-39 Resource File Manual, p. 6-7 Appendix - Questionnaire p. 48-58	Assigned reading in Manual Pamphlets Assigned reading in Resource File Manual Brief review Panel presentation of programs likely to be most used by I & R Network (i.e., social security Medicare-Medicaid, Nursing and Boarding Homes, Public Welfare (OAA) Public Housing - Moderated by coordinator).
Eligibility Factors		Pamphlets - See Bibliography and Supplementary Materials List Training Syllabus, Appendix C, p. 34-39	Assigned reading in Pamphlets
Organization of Resources Local State Federal Public Voluntary		Notes for Manager, Chapter 5, p. 13-14	Assigned reading in Manual Questions and discussion

TRAINING IN THE INFORMATION AND REFERRAL CENTER NETWORK

COURSE OUTLINE

PHASE II - INTERVIEWING AND INFORMATION GIVING: For All Staff

Resource Person	Content	Reference	Method
Training Coordinator or Casework Instructor	Definition of Interviewing	Interviewing and Information Giving Manual - p. 1	Assigned reading in Interviewing and Information Giving Manual
	Knowledge of Self	Interviewing and Information Giving Manual - p. 1-6 Bibliography #15 & #17	Lecture presentation Group Discussion
	Knowledge of the Elderly	Bibliography #11 Bibliography #13	Lecture presentation
	Process of Interviewing	Interviewing and Information Giving Manual, Chapter 2, p. 7-14 Bibliography #24 & #25	Assigned reading in Interviewing and Information Giving Manual Discussion Role play Lecture presentation Film: "ADC in Interviewing"
	Attitudes in Interviewing Individualization Client self-determination	Bibliography #19 Bibliography #19 Bibliography #19, Interviewing and Information Giving Manual p. 9	Lecture presentation Group discussion Role playing Assigned reading in Manual
	Confidentiality Acceptance of client Controlled emotional involvement	Bibliography #19 Bibliography #19 Bibliography #19, Interviewing and Information Giving Manual p. 12	
	Purposeful expression of feeling	Bibliography #19, Interviewing and Information Giving Manual p. 12	
	Non-judgmental attitude	Bibliography #20	

TRAINING IN THE INFORMATION AND REFERRAL CENTER NETWORK

COURSE OUTLINE

PHASE II - INTERVIEWING AND INFORMATION GIVING: For All Staff

Resource Person	Content	Reference	Method
Training Coordinator or Casework Instructor	Some aspects of interviewing Establishing rapport Listening attentively Beginning where client is Being flexible Having patience Being thoughtful in detail Securing privacy for interviewing in office	Bibliography #26 Bibliography #33 Interviewing and Information Giving Manual - p. 10	Assigned reading in Interviewing and Information Giving Manual Lecture presentation Discussion Role play
	Information giving - Knowing enough about person's problem Giving information useful and relevant to person Making sure people understand	Interviewing and Information Giving Manual - p. 8 p. 11 p. 11	Assigned reading in Interviewing and Information Giving Manual Demonstration Role play Discussion
	Practical Application Use of the telephone	Telephone Company Film	Use of telephone by film demonstration
	Using the Resource File in information giving	Sample questions in Training Syllabus, Appendix B, p. 18 Directory of files of existing I & R Center	Role playing with sample problems selected from sample questions and use of directory
	Use of forms Personal - Record Card Tally sheet	Interviewing and Information Giving Manual, Chapter 3, p. 14-16 Appendix, p. 19, p. 20-34	Demonstration Lab assignment

TRAINING IN THE INFORMATION AND REFERRAL CENTER NETWORK

COURSE OUTLINE

PHASE III - REFERRAL: For All Staff

Resource Person	Content	Reference	Method
Training Coordinator	Definition of referral	Referral, Chapter 1, p. 1-2	Assigned reading in Manual Lecture presentation
	Reasons for referral Client's fear Client's incapacity Client's uncertainty Client's life endangered Agency's eligibility requirements	Referral, Chapter 2 Bibliography #27	Assigned Reading in Referral Lecture presentation Group discussion
	Process of referral Assess need Decide on Agency Discuss with client Seek permission of client Check with agency Give information to client Make referral for cleint	Referral, Chapter 3 Bibliography #27	Assigned reading in Referral Lecture presentation Group discussion
	Degrees of referral	Referral, Chapter 4 List of sample problems, Training Syllabus, Appendix B	Assigned reading in Referral Lecture Role playing with sample problems in Training Syllabus and use of Directory from existing I & R center
	Use of Forms Referral card Referral letter	Referral, Chapters 5 & 6 Appendix	Demonstration

TRAINING IN THE INFORMATION AND REFERRAL CENTER NETWORK

COURSE OUTLINE

PHASE III - FOLLOW-UP: For All Staff

Resource Person	Content	Reference	Method
Training Coordinator	Definition of Follow-Up	Follow-Up, Chapter 1, p. 1	Assigned reading in Follow-Up Lecture presentation
	Purpose of Follow-Up Link people to service Monitor center's work	Follow-Up, Chapter 1	Assigned reading in Follow-Up Lecture presentation
	Reasons for Follow-Up Get services for people who did not get it Make agencies more accountable for service Secure planning information	Follow-up, Chapter 1, p. 1-2	Assigned reading in Follow-Up Lecture presentation Group discussion
	Follow-Up may lead to: Advocacy Research Better resources for older people Better coordination of services for older people.	Follow-Up, Chapter 1, p.2	Assigned reading in Follow-Up Lecture presentation Group discussion
	Process of Follow-Up Returned referral form Follow-up with client Follow-up with agency	Follow-Up, Chapter 2	Assigned reading in Follow-Up Group discussion Lecture presentation Role play
	Action resulting from Follow-Up Correct resource file Provide escort service Give person new information Record non-existent services Report unusual circumstances to AoA	Follow-Up, Chapter 1, p. 2	Assigned reading in Follow-Up Lecture presentation Group discussion

TRAINING IN THE INFORMATION AND REFERRAL CENTER NETWORK

COURSE OUTLINE

PHASE III - FOLLOW-UP: For All Staff

Resource Person	Content	Reference	Method
Training Coordinator	Volunteers for Follow-up Use of Forms	Follow-Up Chapter 3 Follow-Up, Chapter 2, p. 4	Assigned reading in Follow-Up Lecture presentation Assigned reading in Follow-Up Demonstration

TRAINING IN THE INFORMATION AND REFERRAL CENTER NETWORK

COURSE OUTLINE

PHASE III - VOLUNTEER ESCORT SERVICE: For Center Managers

Resource Person	Content	Reference	Method
Training Coordinator	Why an Escort Service	Volunteer Escort Service, Chapter 1	Assigned reading in Manual Lecture presentation Discussion
	Recruiting Volunteers for Escort Service	Volunteer Escort Service, Chapter 2	Assigned readning in Manual Lecture presentation Discussion
	How the Escort Service should work	Volunteer Escort Service, Chapter 3	Assigned reading in Manual Lecture presentation Discussion
	Reimbursement for expenses	Volunteer Escort Service, Chapter 4	Assigned reading in Manual Lecture presentation
	The matter of insurance	Volunteer Escort Service, Chapter 5	Assigned reading in Manual Lecture presentation
	Thank you's	Volunteer Escort Service, Chapter 6	Assigned reading in Manual Lecture presentation
	Escorting the physically disabled	Volunteer Escort Service, Chapter 7	Assigned reading in Manual Lecture presentation Discussion
	Orientation meeting for Volunteer Escorts	Volunteer Escort Service, Chapter 8	Assigned reading in Manual Lecture presentation Discussion Role Play
	Chairman of Volunteer Escort Service	Volunteer Escort Service, Chapter 9	Assigned reading in Manual Lecture presentation

TRAINING IN THE INFORMATION AND REFERRAL CENTER NETWORK

COURSE OUTLINE

PHASE III - ADVOCACY: For All Staff

Resource Person	Content	Reference	Method
Training Conductors or Special Instructor	Constraints and limitations on use of Advocacy Risk involved Center's image Time Necessary skill	Advocacy, Chapter 3, p. 9 Bibliography #28, p. 19 & 20 Bibliography #31, p. 355-57 Bibliography #30, p. 11-14	Assigned reading in Advocacy Manual and Bibliography Lecture Group discussion
	Conclusion	Advocacy, Chapter 4, p. 12	Assigned readings in Advocacy Manual Lecture

TRAINING IN THE INFORMATION AND REFERRAL CENTER NETWORK

COURSE OUTLINE

PHASE III - ADVOCACY: For All Staff

Resource Person	Content	Reference	Method
Training Coordinator or Special Instructor	Definition of Advocacy	Advocacy, Chapter 1 Bibliography #28, p. 16 & 17	Assigned reading in Advocacy Manual and Bibliography
	Advocacy functions	Bibliography #31, p. 354-357 Bibliography #30, p. 4-9	Lecture
	Purpose of and reasons for advocacy	Advocacy, Chapter 1, p. 1-2 Bibliography #31, p. 347 Bibliography #29, p. 6 Bibliography #30, p. 10	Assigned reading in Advocacy Manual and Bibliography Lecture Group discussion
	Advocacy at various levels Where Advocacy Begins	Advocacy, Chapter 2, p. 3 Bibliography #31, p. 348	Assigned reading in Advocacy Manual Lecture Group discussion
	Case Advocacy	Advocacy, Chapter 2, p. 4 Bibliography #31, p. 348-351	Assigned reading in Advocacy Manual and Bibliography Lecture Role Play
	Policy or program Advocacy at agency level	Advocacy, Chapter 2, p. 5-6 Bibliography #31, p. 354	Assigned reading in Advocacy Manual and Bibliography Group discussion
	Social Action: local, state and national Reporting to AoA & community Speaking before community groups Writing letters to editors, Congressmen, President Testifying before officical bodies	Advocacy, Chapter 2, p. 7-8 Bibliography #31, p. 352-354 Bibliography #30, p. 9	Assigned reading in Advocacy Manual and Bibliography Lecture Lab assignment Role play

TRAINING IN THE INFORMATION AND REFERRAL CENTER NETWORK

COURSE OUTLINE

PHASE IV - OUTREACH: For Center Managers & Outreach Supervisory Staff

Resource Person	Content	Reference	Method
Training Coordinator or Specialist in Supervision	<u>For all Outreach Staff</u> Introduction: What Outreach is What are its goals	<u>Reaching Out</u>, p. 1 & 2	Assigned reading in Manual Lecture Discussion
	<u>For Manager and Outreach Supervisory</u> Outreach workers: Job description, Recruiting and selecting, Salary, Working hours, and Training	<u>Reaching Out</u>, p. 3-9	Assigned reading in Manual Lecture Discussion
	Supervising outreach workers	<u>Reaching Out</u>, p. 9-15 Bibliography #36 Bibliography #37	Assigned reading in Manual Discussion Role play
	<u>For Manager</u> Canvassing Selecting outreach	<u>Reaching Out</u>, p. 16-25	Assigned reading in Manual Discussion of examples
	Making canvassing assignments	<u>Reaching Out</u>, p. 25-27	Assigned reading in Manual
	Pre-canvassing activites	<u>Reaching Out</u>, p. 27-29	Discussion of examples Lecture Discussion

TRAINING IN THE INFORMATION AND REFERRAL CENTER NETWORK

COURSE OUTLINE

PHASE IV - OUTREACH: For Outreach Workers

Resource Person	Content	Reference	Method
Training Coordinator or Specialist in Outreach	Job of Outreach Worker	Reaching Out, p. 30	Assigned reading in Manual Lecture Discussion
	How to interview	Reaching Out, p. 30-36	Assigned reading in Manual Discussion Role Play
	Interviewing - What to avoid	Reaching Out, p. 36-38	Assigned reading in Manual Discussion Role Play
	Interviewing - Problems you may have	Reaching Out, p. 38-40	Assigned reading in Manual Discussion Role Play
	Interviewing - Things to learn	Reaching Out, p. 40-43	Assigned reading in Manual Discussion Role Play
	Using the interview schedule	Reaching Out, p. 43-44	Assigned reading in Manual Discussion Role Play
	Referral	Referral Procedures	Assigned reading in Manual Lecture Discussion
	Follow-Up	I & R Services: Follow-Up	Assigned reading in Manual Lecture Discussion

APPENDIX B

SAMPLE QUESTIONS

Sample Questions

1. Can you help me get a lawyer?
2. How do you become an American Citizen?
3. The insurance company won't settle my claim.
4. The moving company banged up my furniture, can I make them pay?
5. I was taken by a door-to-door salesman.
6. Somebody junked a car in front of my house.
7. Where do I go for a cancer check-up?
8. I'm black, and they won't rent me an apartment.
9. They're always telling ya 'write your congressman' - who's mine?
10. What do I do - a dog just bit my husband?
11. I want to start my own business, but I'm not sure how to begin.
12. My Social Security check didn't come this month.
13. My wife and I aren't making it.
14. We want to adopt a baby.
15. Where does an old man like me go to pass his time?
16. I need a business loan.
17. You should have seen the way that cab driver treated me.
18. Where can I get a free chest X-Ray?
19. Some outfit sent me some stuff I didn't order.
20. How can I get my birth certificate?
21. I've got some good clothes I'd like to give to somebody.
22. Can I go to school nights to get my high school diploma?
23. My husband's an alcoholic, what can I do?
24. Is there an all-night drugstore in my neighborhood?
25. What's the emergency poison control number?
26. Is there any way I can get the money to buy my own cab?
27. Do you know where I can find someone to clean my house?
28. We don't have enough food for supper. Can you help me get some?
29. I would like to do volunteer work with young children, particularly arts and crafts. Where should I go?
30. I heard the government will help low-income families purchase homes. Is that true?
31. My daughter is an epileptic and needs constant medication. Can we get it at a discount somewhere?
32. Can you help us find furniture? We need some new beds.
33. I need a ride to pick up groceries. I'm 82 years old and can't walk too well.
34. Sometimes I feel like killing myself. Can you help me? I'm afraid.
35. I would like information on air pollution. Who should I contact?
36. My dog is sick and I can't afford a vet. Is there some help for him?
37. What is the agency that helps people whose house has burned?
38. Do you know of a good nursing home for my father?
39. Where can I call to have meals prepared and delivered to a woman who is being discharged from the hospital?

APPENDIX C

BIBLIOGRAPHY AND SUPPLEMENTARY MATERIALS

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and

Supplementary Materials*

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